Keener Financial Planning Uses MassMailer to Help Meet SEC Compliance Regulations

Financial Services

Solution

Keener looked for a solution to send email attachments and archive directly within Salesforce and found MassMailer.

Background

Keener Financial Planning provides a full range of comprehensive financial planning services.

Like similar firms, they are obliged by SEC regulations to send their policy documents at least once a year to all their accounts and archive them for compliance purposes.

They originally used Redtail CRM for sending and achieving policy documents, but in 2017 switched to Salesforce because it had better support for TD Ameritrade, which they use. Once they switched to Salesforce, they realized that they had lost the functionality to send and archive attachments via the standard Salesforce email capabilities.

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Benefits

Keener has found MassMailer a great tool for recording emails directly in Salesforce and also in Outlook.

They are now looking to expand MassMailer to support other operational processes like client onboarding and confirmations, which currently require manual cut-and-paste work with email templates that are very time-consuming.

Utilizing MassMailer's Salesforce integration with Work Flow and Process Builder, along with merge capabilities, will enable these new use cases.

According to Lauren Rose, Technology and Project Specialist at Keener Financial Planning, “Of all the vendors I work with, MassMailer is the most courteous, professional, and helpful, and that is greatly appreciated by all at the firm.”

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